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## ASSESSING PROSPECTS FOR INDUSTRIAL AGGLOMERATION DEVELOPMENT: CASE OF CENTRAL & EAST EUROPE COUNTRIES

*The paper systemizes existing studies devoted to agglomeration formation and functioning and exploring the peculiarities of agglomerations' development in CEE countries. The research is based on a comparison of indicators for industrial agglomeration development in 51 region of CEE countries. The assessing prospects for industrial agglomeration development were conducted using the following groups of indicators: localization level, availability of resources, the demand for the products of the agglomeration area. The study used methods of analysis and synthesis of scientific generalization, comparison, induction and deduction. Results of the research shows that an important feature for agglomeration development in Central and Eastern Europe were foreign investment resources in the region, which is associated with the emergence of clusters in these regions, although this investment was not the only determinant of success. The success of agglomeration origination with foreign investment was driven by the presence of industrial agglomerations in key areas and related supporting industries. It builds up a competitive advantage in the region and specialization in international supply chains, supply of resources (labor, production, logistical), unmet demand in the domestic markets of these countries. As the prerequisite of agglomeration development was availability of resources (natural; capital; technological). Primary lack of capital; technological resources was compensated because of the transfer of activities from abroad due to other competitive advantages of the regions. Availability of market opportunities and demand for agglomerations' products was an important aspect of determining the potential due to unsatisfied demand in national markets of the countries and proximity to customers in West European markets.*

**Key words:** agglomeration; localization; prerequisites of agglomeration development; Central and Eastern Europe countries.

**Introduction.** Main feature of the current stage of world economy development is establishment of a new model of its functioning based on the new stage of the science and technology revolution. Agglomeration forms of economic activity are considered ones of the most successfully in implementation of new technologies. The experience of Central and Eastern Europe (CEE), which in recent decades have made quality and systemic transformation of national economies, prove the effectiveness of such forms in achieving the highest outcomes of economic activity. However, agglomerations are very dynamic and changing. Some of them, disregarding previous success, ceased its functioning, other endured transformations.

This actualizes the need for assessing the development of such structures and determining their further prospects for growth. Exploiting the experience of CEE countries is extremely urgent for economic development of Ukraine due to the need to determine the prospects of Ukraine agglomerations development, exploring successful experiences and determining potential omissions in development strategies to avoid them.

For that reason, the **purpose** of the research is to systemize existing studies into the agglomeration formation and exploring the peculiarities of agglomerations' development in CEE countries.

**Literature review.** Theoretical aspects of the concept of agglomeration itself, its effects and advantages of functioning were diccovered in the studies of M. Porter, B. Price, S. Kamath, E. Feser. M. Enright, M. Porter and others. The main principles of innovative structures formation based on practical experience explored in studies of P. Fischer, M. Feldman, Schumpeter and others. There are studies dedicated to the problem of agglomeration development in CEE countries conducted by such authors as: A. Kovalski, P. Zamborski, R. Rebelotti, as well as in the works of Ukrainian authors such as I. Bakushevych, Z. Varnaliy, M. Voinarenko, V. Novytskii.

These studies are devoted to the identification and evaluation of agglomerations. Porter offers a model that takes into account the following elements [1]: inputs, demand conditions, related and supporting industries, firm strategy and competition. notes that M. Porter's model may be incomplete interpretation of the identification and evaluation of agglomerations success; to overcome the limitations of the model he offers its own assessment of the

identification and evaluation of agglomerations formation prospects entitled GEMS (Global Economic Management System – GEMS). This model along with elements of M. Porter diamond offers such elements as [2]: business climate, the anchor effect, industrial networks, the concentration of firms, innovation potential, historical factors. J. Nimen notes that the cluster success of the operation of the effect following elements [3]: general economic conditions, established for this industry; the potential for the development of new productive capacity; availability of qualified experienced entrepreneurs; availability of investors willing to invest in new businesses. S. Sokolenko identified such prerequisites for agglomeration formation as [4]: the existence of competitive enterprises or those with potential opportunities for development; geographical proximity of enterprises, the existence of "critical mass" of companies or potential for its creation; and the links between potential participants of the clusters and the availability of competitive advantages" in general.

Thus, there are several approaches to determining the prerequisites of potential for agglomeration development. However, there are the need for further studies on evaluation stages of agglomerations development, their peculiarities and models of their formation in CEE countries.

**Methodology.** The research is based on a comparison of indicators for industrial agglomeration development in 51 region of CEE countries based on statistical data of Eurostat, observational data of European Cluster Observatory in CEE, and case studies of domestic and foreign experts, materials of World Bank, periodicals. The assessing prospects for industrial agglomeration development were conducted using the following groups of indicators: localization level, availability of resources, the demand for the products of the agglomeration area. The study used methods of analysis and synthesis of scientific generalization, comparison, induction and deduction.

For the purpose of the research, agglomeration is considered as territorial concentration of enterprises and other economic entities, belonging to one industry or related industries with developed system of economic relations between them. Assessment of agglomeration functioning can be divided into general economic conditions and specific microeconomic conditions that reflect the peculiarities of economic entities functioning and development within sectors and regions.

**Main findings.** Agglomerations development can be described using the following components: localization level (volume of employment in the sector and basic industries), availability of resources (volume of investment

resources, human resources, infrastructure, scientific and technical resources), the demand for the products of the agglomeration area (as the actual volume of demand), the level of interactions between the parties (Tab. 1).

**Table 1. Evaluation criteria of agglomeration potential in terms of international business environment**

Group	Criteria	Sufficiency level
Localization	<ul style="list-style-type: none"> <li>spatial proximity of enterprises;</li> <li>concentration of enterprises;</li> <li>specialization, complementarity of participants</li> </ul>	the existence of "critical mass" or possibility for its creation; the ability to create "anchor effect" for the formation and attraction of new businesses
Recourses	<ul style="list-style-type: none"> <li>natural</li> <li>employment</li> <li>capital</li> <li>technology and know-how</li> <li>infrastructure</li> <li>intangible non-profit resources</li> </ul>	lack of natural resources can be compensated by international activity development; capital resources can be compensated in case of high yield planned activities; lack of material capital resources and infrastructure also can be compensated in the same case, but it needs time.
Demand	<ul style="list-style-type: none"> <li>domestic demand conditions (volume and dynamics)</li> <li>external demand conditions</li> <li>companies opportunities to meet demand</li> </ul>	The demand conditions for end products with the opportunities to meet demand; or potential for creating demand

Source: developed by author.

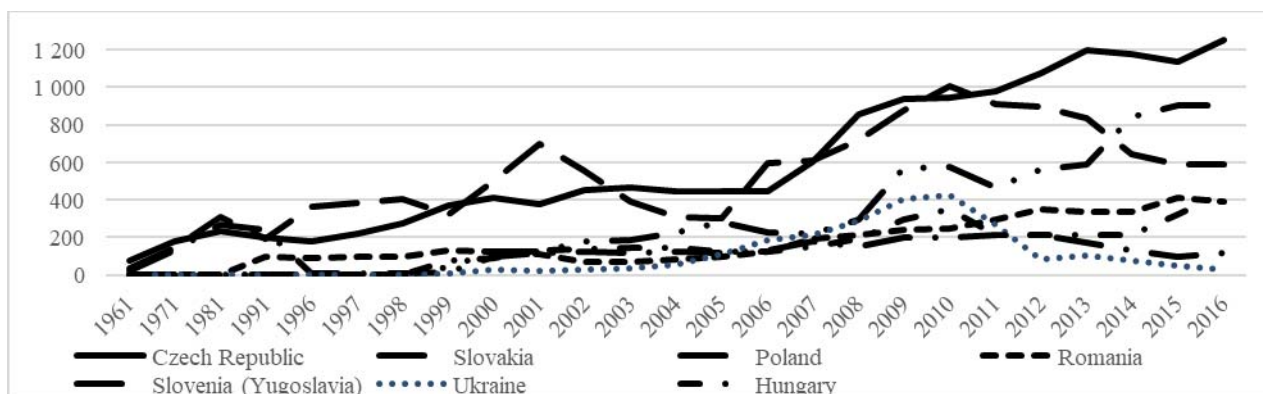
1. Localization of economic activity

Localization of economic activity can be characterized using the assessment of the following indicators: spatial concentration of enterprises, specialization and focus activities of participants, the presence of a balanced composition of participants in agglomeration. S.Sokolenko outlines geographic concentration of enterprises as the prerequisites for cluster development. When key participants are in high proximity to each other, it opens the opportunities to activate interaction and increase the number of contacts and relationships among them [4], which generally can be described as spatial proximity.

There is an interconnection between the industry stage and the geographical concentration, as the M. Menzel outlines [5]. For industries that are at maturity stage, an indicator of potential for cluster development is an existence of such a "critical mass", which designates a favorable base for entrepreneurship development in the

region. If the industry is at its maturity, and the concentration of businesses and individual initiatives are low, this designates low region or industry potential for clusterization. For industries at the beginning of the life cycle distinct spatial concentration is observed, except for some small agglomerations. Enterprises begin agglomerate as the industry starts growing.

The first stage motor origin agglomerations in CEE related to the opening of markets in these countries, but it has not led to an entirely new trend in the automotive industry, strengthening the market position of existing capacity, but which were in the stage of decline. Foreign Investment Projects in 1989 strengthened the three former industrial structures that were created in socialist times, the Czech Republic, Poland, Slovakia and led to their development, creating new round of that decade led to the formation of agglomerates.



**Fig. 1. Vehicle production in CEE countries, 1961-2014, units, in thousand**

Source: compiled by author based on [6], [7].

As shown in Fig. 1 production volumes in Romania were small, remaining stable from 1981 to 2002, but automotive sector upgrading caused attraction of foreign manufacturers to Romania, which next led to a new step in the industry development and contributed to the emergence of agglomerations.

Agglomeration, starting from a small number of companies, develops to a large scale, involving a large number of new businesses. Deployment of TNCs automotive production capacity in the CEE region just reflect such trends. The territory of these countries was quite attractive due to the proximity to Western European

countries, the availability of relatively cheap highly qualified labor force, own car industry and unsatisfied domestic demand, which was the impetus for the emergence of automobile agglomerations in these countries.

From a global perspective the Czech Republic, Hungary and Poland is part of the Central European automotive agglomeration. Which originated in the Central Bohemia region by German manufacturers investments (since 1991 when Volkswagen gained control of Skoda Auto in Mlada Boleslav). Another foreign manufacturer, that successful entered the territory of Central Bohemia is an Toyota Peugeot Citroën Automobile (TPCA). The company

invested in the construction of car plant in Kolin, which from establishing production of small cars like the Toyota Aygo, Peugeot 107 and Citroen C1 in 2005, the annual capacity

of 300 ths. cars, later becoming one of the biggest exporters in the Czech Republic.

**Table 2. Activities leading automotive multinationals in the region Central and Eastern Europe**

	Region	Trade mark	Year	Results 2016		
				Production volume, in unit	% of the total world production	% of the total production of the EU
Czech Republic	CZ02 – Czech average	PSA	2002	130449	5,17%	8,19%
		TOYOTA	2002	72492	0,82%	15,41%
		VOLKSWAGEN	1991	655748	6,71%	13,93%
	CZ08 – Moravia-Silesia	HYUNDAI	2008	30745	0,40%	48,71%
Hungary	HU22 – Western Transdanubia	AUDI	1997	135232	1,38%	2,87%
		SUZUKI	1992	146365	5,76%	100,00%
	HU33 – Southern Great Plain	FIAT (Suzuki production facilities)	-	2182	0,11%	0,33%
		MERCEDES	2008	15029	0,83%	1,09%
Poland	PL22 – Silesian	FIAT (including Ford-K)	1992	259431	13,62%	39,56%
	PL41 – Wielkopolska	VOLKSWAGEN	1996	154272	1,58%	3,28%
Romania	RO31 – Northwest	DACIA	1999	338882	14,13%	30,40%
	RO41 – Southwest	FORD	2008	52829	1,64%	4,88%
Slovakia	SK01 – Bratislava Region	AUDI	1991	60990	0,62%	1,30%
	SK02 – West	PSA	2003	240019	9,52%	15,07%
		KIA	2004	32372	0,42%	51,29%
	SK03 – Central	VOLKSWAGEN	2000	26234	0,27%	0,56%
Slovenia	SI01 – Eastern Slovenia	RENAULT	1988	118533	4,94%	10,63%
		MERCEDES	-	11998	0,66%	0,87%

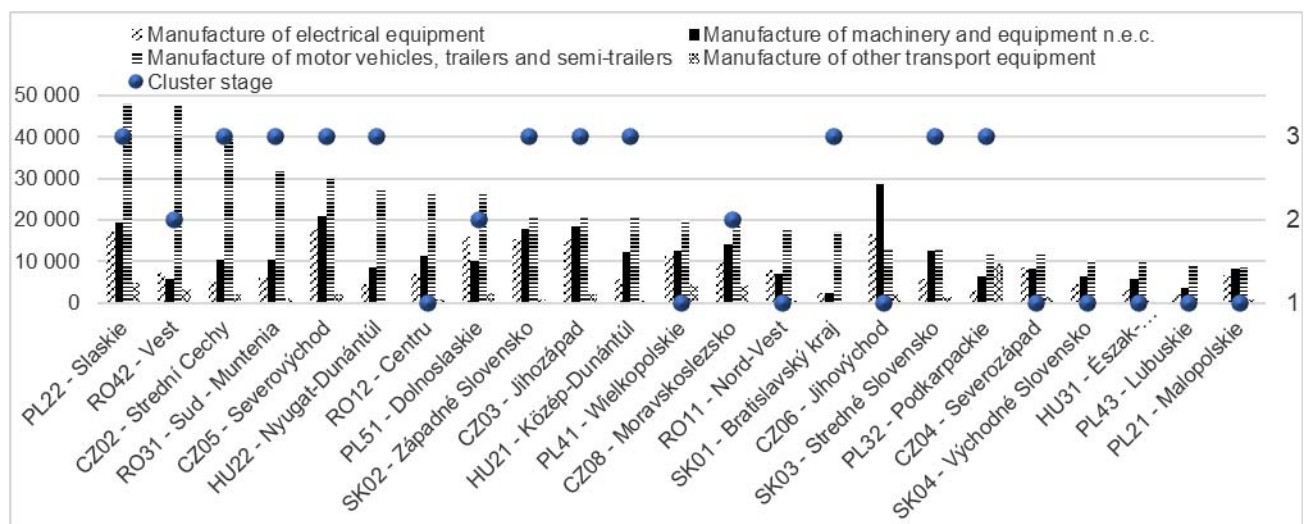
Source: compiled by author based on [6], [7].

Decision of Korean automobile manufacturer Hyundai to invest in the East region of the Czech Republic, increased automotive localization in Central and Eastern Europe and potential for neighboring region of Slovakia agglomeration development. Later the region attracts VW, Kia and Peugeot. Such an anchor effect can also be seen in the automotive industry in Poland, where the inflow of foreign direct investment to the automotive industry caused dynamic development of subcontractors, prompting other participants to enter the country and the deployment of its assembly plants there. These were Toyota, Isuzu, Volkswagen, MAN, Volvo, Michelin and General Motors [8]. Investments in the automotive industry (or reinvestment companies that already operate in Poland) stimulate the development of regular companies and creation of new jobs. There are many sub-suppliers in the automotive industry currently in Poland, and engines production becomes Polish specialty. Its production is concentrated around four agglomerations: Katowice, Wroclaw, Poznan and Warsaw.

The emergence of anchor effect in Romania can be observed in the 2000s in the textiles, clothing and footwear industries, when many enterprises of this sector have

started outsourcing its clothing production. For example, cluster Montebelluna in Italy began to move their production facilities to Timisoara in the early 2000s due to the need to develop their own competitive advantages of Italian industry comparing with Chinese competitors. This formed the satellite agglomeration with high concentration of textile industry enterprises that has been developed only due to foreign investment.

We explore the relationship between the localization of business activity in some regions of these countries and the state of cluster development in them to assess the level of agglomerations in CEE. Because cluster can be considered as an advanced form of agglomeration with established economic ties between the parties. Not all regions where there is a presence of a large company's concentration have developed agglomerations. That is became obvious when studying the example of the automotive industry functioning in CEE region given in Fig. 2., which shows the number of employed in the automotive industry, other transport manufacturing and engineering in general and are compared with the state of clusters (Fig. 2).



**Fig. 2. The relationship between the level of employment in the CEE regions and the state of cluster development in 2016**

Source: compiled by author based on [6], [9].

Fig. 2 shows that relation between the amount of employment in the region and the presence of clusters is not always true. For example, the Western Romania region's auto industry employs more than 45 thousand persons has no developed cluster. Although there is cluster under formation in the Central region of Romania, where the level of employment in the industry consists of 25 thousand persons. Thus, the high volume of employment does not always mean cluster existence and does not necessarily lead to its appearance. The high level of employment indicators does not always characterize developed agglomeration.

2. Availability of resources.

Availability of natural resources, labor, capital, technology is considered the prerequisite for the development of business activity in the region and attraction of business entities in it. The Central and Eastern Europe region evidence the trend to agglomerate in the sectors of major specialization in the region. However, at the beginning of 1990, by the time of foreign companies' first entry into the region, such industries were not developed, and in fact were more in a stage of the resource base, potentially attractive for the formation of agglomerations. Such resource base was represented by the cheap labor force, natural resources, industrial infrastructure and the presence of specific knowledge, potentially attractive for the formation of industrial regions. For example, Romanian textile industry development started due to specific traditions and technologies in the region. It goes back at least to the 15th century when the first cloth guilds were created and the first textile factory were opened in 1867. But the crucial factor was the foreign direct investment of Italian companies to the regions with

textile industry specialization. Most of the clusters in Romania were developed in Arad, Timisoara and Bucharest areas. The success of the automotive industry cluster development, emerging as a part of international clusters from Western Europe, was also due to similar factors, especially to significant production infrastructure remained after soviet period [10].

Availability of technological resources, as a factor of agglomeration success, includes formal and implied technological resources. Formal technological resources can be evaluated in terms of patents and intellectual property rights, licensing statistics, expenditures on research and development. Implicit technological resources can be characterized as availability of specialized knowledge or traditions in the manufacture of certain products.

The availability of capital resources both in physical and monetary terms is an important prerequisite to for the agglomeration formation. Although their absence can be compensated by involving in international activities. However, as noted by Porter, a source of competitive advantage and thus a prerequisite for the clusters formation is not about the problem to access investment resources, but the ability of companies to use these investments in the most efficient manner [11]. The presence of physical capital is most important from the point of time. Modern production facilities and research laboratories, the availability of infrastructure: physical, logistics, innovation builds up a competitive advantage of a higher level, but require significant time and cost for their creation and development.

An important aspect of agglomerations development process of CEE region was attraction of FDI (Fig. 3).

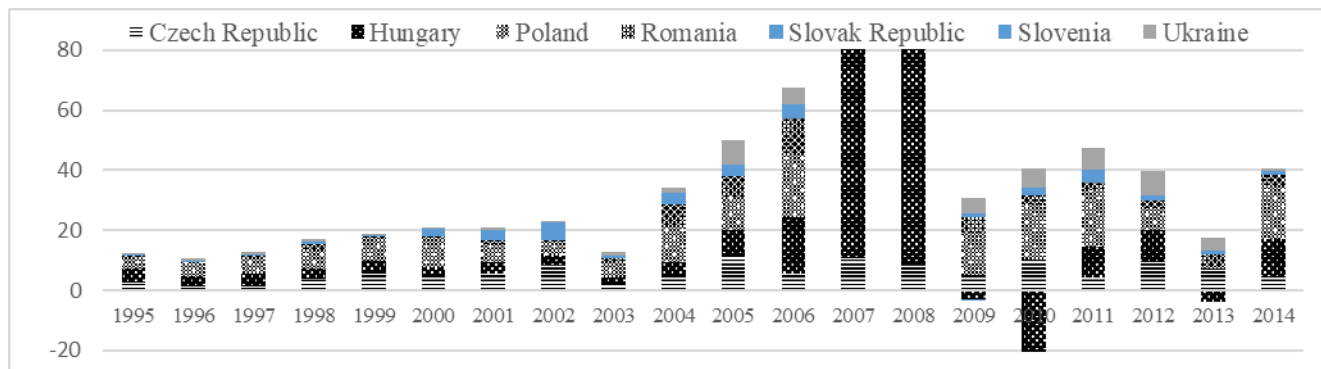


Fig. 3. Net FDI inflows in some CEE countries, 1995-2014, bln. USD

Source: compiled by author based on [13].

Assessment of human resources potential is usually focused on internal human resources in the region. Central European countries has highly skilled workers, engineers and managers. That makes possible not only to create complex industries in the region, but also conduct experimentation with new systems of production (as an example, the development of module production at Skoda) [3].

Natural resources, climate, geographical location, which are the main factors, and those which country receives as an inheritance or with small investments, are the most important in the extractive industries and in industries associated with agriculture. For the development of other sectors, such advantages are not particularly important.

3. A demand for products

The first critical factor for agglomeration development is the availability of market opportunities. Sometimes a market niche is already present, sometimes is potential,

attracting the interest of companies in these areas. If there is a sizeable market opportunity, then there are prospects for growth. An important aspect of determining the potential for agglomeration development is to determine the final product demand. Thus, it is necessary to separate domestic demand and demand in foreign markets.

Launching automotive clusters in CEE countries was due to the growing demand in the global market for automotive production, prompting companies from Western Europe to launch production in Eastern Europe to optimize production processes for sales in existing markets. An important role also played a domestic demand in the CEE countries. There was a shortage of passenger cars in 1990. And it was a good opportunity for automotive TNCs to enter these markets. So the leader on the Polish automotive market became the Italian "Fiat" (in 1996 Poles bought 109,000 cars of this group), in the Czech Republic

in terms of sales was leading the German "Volkswagen" and its sister group "Daewoo", in Romania – the South Korean company "Daewoo", in Slovenia – French "Reno" and Hungarian – Japanese "Suzuki". Moreover, the share of Russian "AvtoVAZ", which once held a prominent place in CEE, had less than 1 % of sales. Total sales in CEE in 1996 was about 900 thousand cars (in 1994 the figure was 461,483) [8; 9; 11]. In fact, the largest market share in sales was owned by the companies, which had the largest share in industry production in country. In addition, almost the same trend we can see nowadays (Table 2).

Changing of demand conditions for the final products affects the demand for companies' suppliers and the demand for products throughout the value chain. This

example shows Hungary. Since the early 90's there were many car assembly plants in neighboring countries in Eastern Europe – Slovakia, the Czech Republic and Romania. New markets development was very favorable for Hungarian suppliers. In 1992-2000, production of the automotive industry in Hungary has increased by 810%. This is almost 4 times more than average industry increase [12].

The relationship between the demand for final products and intermediate demand was characteristic not only of inter-firm linkages within the region of Central and Eastern Europe, but also in conjunction with major countries – partners in CEE countries (Germany, France, Italy), who placed production capacity in the CEE countries, but the final assembly and sales remained for them (Fig. 4).

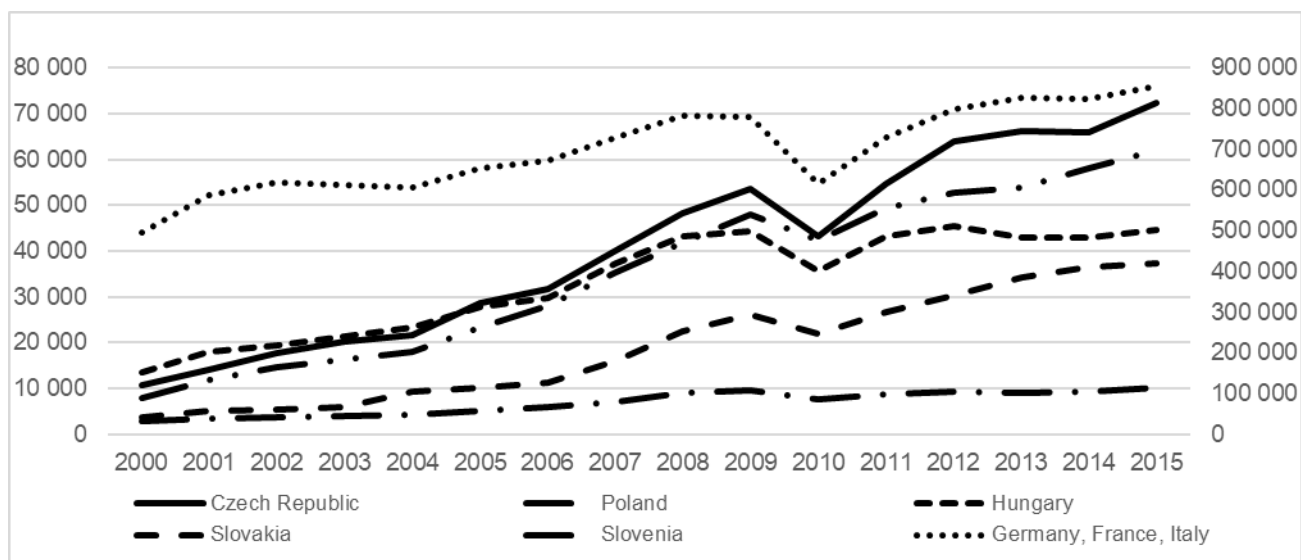


Fig. 4. Exports of automobile industry 1999-2014 year, mln. Euro

Source: compiled by author based on [13].

Fig. 4 shows that export dynamics of CEE is similar to the export dynamics of Germany, France, Italy, which is particularly evident in 2003, 2005, 2008-2010 and 2013 and there is some interconnections. These trends show drop in CEE export of machinery parts and components due to decreasing need for such products by leading countries in certain periods and respectively the increase of automotive industry products of Germany, France and Italy caused increase in exports of CEE countries. That is why, in the most general terms, we can specify some connection between demand for final products for Western Europe countries and derived demand for CEE countries products.

#### Conclusions.

Results of the research shows that an important feature for agglomeration development in Central and Eastern Europe were foreign investment resources in the region, which is associated with the emergence of clusters in these regions, although this investment was not the only determinant of success. The success of agglomeration origination with foreign investment was driven by the presence of industrial agglomerations in key areas and related supporting industries. It builds up a competitive advantage in the region and specialization in international supply chains, supply of resources (labor, production, logistical), unmet demand in the domestic markets of these countries. As the prerequisite of agglomeration development was availability of resources (natural; capital; technological). Primary lack of capital; technological resources was compensated because of the transfer of

activities from abroad due to other competitive advantages of the regions. Availability of market opportunities and demand for agglomerations' products was an important aspect of determining the potential due to unsatisfied demand in national markets of the countries and proximity to customers in West European markets.

**Discussion.** Further studies should be devoted for modeling and estimation of cluster growth types in CEE region and ascertainment the economic interest of agglomeration participants' and mechanisms of their conciliation in the context of agglomeration growth strategies. The issue of innovation activity growth peculiarities and mechanisms of implementation of CEE regions agglomeration best development practice for Ukraine also should be further explored.

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## ОЦІНЮВАННЯ ПЕРСПЕКТИВ РОЗВИТКУ ПРОМИСЛОВИХ АГЛОМЕРАЦІЙ: КРАЇНИ ЦЕНТРАЛЬНОЇ ТА СХІДНОЇ ЄВРОПИ

Розкриваються особливості розвитку агломерацій у країнах ЦСЄ. Дослідження базується на порівнянні показників розвитку промислової агломерації в 51 регіоні країн ЦСЄ. Перспективи оцінки розвитку промислової агломерації були проведені з використанням таких груп показників: рівень локалізації, наявність ресурсів, попит на продукти зони агломерації. У дослідженні використано методи аналізу та синтезу наукового узагальнення, порівняння, індукції й дедукції. Результати дослідження показують, що важливою особливістю розвитку агломерації в Центральній та Східній Європі було залучення іноземного інвестиційного ресурсу в регіони, що пов'язано з появою кластерів у цих регіонах, хоча ця інвестиція не була єдиним визначальним фактором успіху. Успіх виникнення агломерації з іноземними інвестиціями зумовлювався наявністю промислових агломерацій у ключових галузях і суміжних галузях підтримки. Це створює конкурентну перевагу в регіоні та спеціалізацію в міжнародних ланцюжках постачання, постачання ресурсів (робочої сили, виробництва, матеріально-технічного забезпечення), незадоволеного попиту на внутрішніх ринках цих країн. Оскільки передумовою розвитку агломерації було наявність ресурсів (природних, капітальних, технологічних). Первинний брак капіталу; Технологічні ресурси були компенсовані в результаті передачі діяльності з-за кордону через інші конкурентні переваги регіонів. Наявність ринкових можливостей та попит на продукцію агломерації є важливим аспектом визначення потенціалу через невдоволений попит на національних ринках країн і близькість до споживачів на ринках Західної Європи.

Ключові слова: агломерація; локалізація; передумови розвитку агломерації; країни Центральної та Східної Європи.

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## ОЦЕНКА ПЕРСПЕКТИВЫ РАЗВИТИЯ ПРОМЫШЛЕННЫХ АГЛОМЕРАЦИЙ: СТРАНЫ ЦЕНТРАЛЬНОЙ И ВОСТОЧНОЙ ЕВРОПЫ

Раскрываются особенности развития агломераций в странах ЦВЕ. Исследование базируется на сравнении показателей развития промышленной агломерации в 51 регионе стран ЦВЕ. Оценки перспектив развития промышленной агломерации были проведены с использованием таких групп показателей: уровень локализации, наличие ресурсов, спрос на продукты зоны агломерации. В исследовании использованы методы анализа и синтеза, научного обобщения, сравнения, индукции и дедукции. Результаты исследования показывают, что важной особенностью развития агломерации в Центральной и Восточной Европе было привлечение иностранного инвестиционного ресурса в регионы, что связано с появлением кластеров в этих регионах, хотя инвестиции не являются единственным определяющим фактором успеха. Успех возникновения агломерации с иностранными инвестициями обуславливалось наличием промышленных агломераций в ключевых отраслях и смежных поддерживающих отраслях. Это создает конкурентное преимущество в регионе и специализацию в международных цепочках поставок (поставок ресурсов, рабочей силы, производства, материально-технического обеспечения), неудовлетворенного спроса на внутренних рынках этих стран. Поскольку предпосылкой развития агломерации было наличие ресурсов (природных, капитальных, технологических). Первичный недостаток капитала и технологические ресурсы были компенсированы в результате перенесения деятельности из-за рубежа благодаря другим конкурентным преимуществам регионов. Наличие рыночных возможностей и спроса на продукцию агломераций являлось важным аспектом определения потенциала через неудовлетворенный спрос на национальных рынках этих стран и географическую близость к потребителям на рынках Западной Европы.

Ключевые слова: агломерация; локализация; предпосылки развития агломерации; страны Центральной и Восточной Европы.